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Governor's Conference on Value-Added Food Processing
February 12-13, 2001

Proposed Solutions

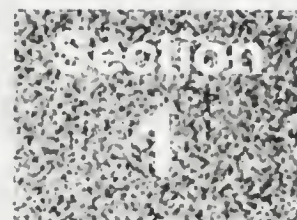
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INTRODUCTION TO PROPOSED SOLUTIONS

The following pages detail only the proposed solutions developed in caucus groups according to topic. For full text notes on the discussions, please refer to the insert entitled "Caucus Notes".



Business Environment

Government Resources & Regulations

PROPOSED SOLUTIONS FOR GOVERNMENT RESOURCE & REGULATION CONSTRAINTS

1. Leverage the business development and regulatory budgets of existing agencies to create a Business Start-up and Expansion Office within state government. That office should have one phone number that processors can call. It is up to the agency to determine to which employee the call is assigned.
2. When a business calls in, the "account" is assigned to one employee. That employee is responsible for determining licensing requirements, regulations, and relevant assistance for the company, and for working with the company to apply for funding and licensing, and to access resources. The information includes city, county, state, and federal programs and regulations.
3. Further increase access to information by creating a "Doing Business in Montana" website.
 - The website should be searchable by the type of business and by location.
 - The website should include all relevant licensing and regulatory information.
 - The website should list federal, state, county, and city agencies involved with business expansion and development.
 - The website would prompt for companies to complete a questionnaire and an initial application.
 - The information is then sent back to the Business Start-up and Expansion office and the company is assigned to an employee.
4. Once information is received from a company, the state "advocate" is responsible for forwarding the initial application to the relevant state

agencies. If it is an application for licensing, the advocate sends the application to all agencies involved. The business then pays ONE fee for licensing and the advocate disperses the funds to the appropriate agencies.

5. The state advocate sends an information packet to the company with relevant programs, regulations, and information on available financing options.
6. The Business Start-up and Expansion office must have standards for responses to producer inquiries, including confirmation of the receipt of inquiry, a timeframe for responses, and contact information for each business inquiry.
7. The state must ensure sufficient infrastructure and qualified employees to make this process effective.
8. Further, the Business Start-up and Expansion advocate is responsible for assisting businesses with inconsistencies in regulations. If a business feels that the regulations they are being asked to comply with are not consistent with state standards, they contact their advocate. That advocate is then responsible for following up with the regulatory agency.
9. The Business Start-up and Expansion office should conduct quarterly seminars concerning the various programs available to businesses and any changes to existing requirements.
10. The Business Start-up and Expansion office is responsible for establishing an attitude of assistance that provides dedicated resources and solutions rather than consequences for non-compliance.

Tax Structure

PROPOSED SOLUTION FOR TAX STRUCTURE CONSTRAINTS

Assign a taskforce that evaluates the best practices of other states and develops a proposal for the Governor.

Community Environments

PROPOSED SOLUTIONS FOR COMMUNITY ENVIRONMENT CONSTRAINTS

Improve education to foster a cultural environment that supports success.

- Provide education regarding the trickle-down affect of successful agricultural business environments in Montana.
- Educate communities on how developing agri-processing businesses helps to reduce urbanization of farmlands.

Commodity Producer Support

PROPOSED SOLUTIONS FOR COMMODITY PRODUCER SUPPORT

We need to change the agricultural commodity mind set in order to develop value-added businesses.

- Education including feasibility analysis is required. Commodity producers do not recognize value-added processing as agriculture.
- We need to educate producer service providers about the benefits of encouraging value-added.

Industry Networks

PROPOSED FUNCTIONS OF AN INDUSTRY NETWORK

Establish a resource library with contacts and information for people who are looking into starting new businesses.

Examining how to improve the value-added processing sector of the Montana economy.

Recruit and leverage industry experts to assist processors in growth and development.

Many industry experts are not being utilized.

Network with the existing associations and alter their focus to include value-added processing. Increase the leverage of the network through existing associations.

Utilize collaboration to leverage existing facilities and assets.

Lobbying and interface with legislators on issues such as tax structure.

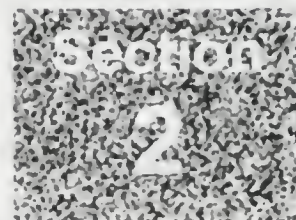
Facilitate cost sharing through collaboration. For instance, Workers' Compensation safety courses could be offered to many companies at once to reduce costs.

Overall Recommendation

Based on the issues and concerns identified by the industry, the Business Environment Caucus recommends that Governor Martz appoint a task force to address the following issues:

1. Forming an industry network. Structure, recruitment, etc.
2. Make recommendations concerning tax structure based on best practices of other states.
3. Make recommendations concerning how to educate communities and commodity producers about the benefits of agricultural processing.

4. Make recommendations on developing a Business Start-up and Development Office of the state government.



Business Training & Development

State Support for Business Development

PROPOSED SOLUTIONS TO STATE SUPPORT FOR BUSINESS DEVELOPMENT CONSTRAINTS

Provide a consolidated and coordinated source of business development assistance and information. Establish a central toll-free number for information assistance and resources. Base the center on best practices of other states.

Assess the available resources, monetary and non-monetary, to develop an ideal "help program" and determine how to access those resources to make things happen. Ensure that assistance providers are knowledgeable of industry capacity, status, abilities and potential.

Develop an educational material packet to help inform a producer on the steps involved in becoming a processor including contact information. For industries where information is available, provide a feasibility analysis for start-ups.

Inventory existing sources of business development assistance. Provide an online list of resource providers and information available in Montana.

Develop a two-tiered training and business development program.

Tier one focuses on training and developing businesses.

Tier two focuses on researching business trends and developing new training programs.

Business Coordination & Cooperation

PROPOSED SOLUTIONS TO BUSINESS COORDINATION AND COLLABORATION CONSTRAINTS

Work to develop a teamwork approach to managing businesses. Leverage strengths of each business to build a stronger whole.

Develop a value-driven vision that is economically and holistically beneficial to Montana.

Develop an industry-driven resource provider or association focusing on creating strategic alliances. Initiate this process by completing an inventory of our industries capacities, abilities, and growth potentials.

Work to develop incubators across the state that provide a place for businesses to come together and help each other out. Firms can share equipment, bookkeeping, sales, etc., and help each other out with expenses.

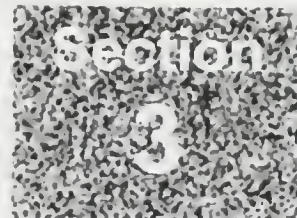
Business Planning

PROPOSED SOLUTIONS TO BUSINESS PLANNING CONSTRAINTS

Inventory the expertise and technology in the state and determine where we have strengths that need to be leveraged.

Recruit resource people for specific areas that all firms are utilizing – CPA's, marketing experts, etc.

Provide training courses for manufacturers (NxLevel was suggested). Make these courses into an on-going program.



Access to Capital

Preparing for Financing

PROPOSED SOLUTIONS TO PREPARING FOR FINANCING

Work with businesses to increase the awareness of bank practices. Conduct seminars that explain how and why banking practices came into existence. Then educate business owners on how to communicate effectively with banks and how to position themselves to attract capital.

It would be useful to the person receiving the loan to have someone available to review the plan for its merit as a financial road map of the business's intentions as well as honing it for lender approval.

State and Federal Funding Programs

PROPOSED IMPROVEMENTS TO STATE AND FEDERAL PROGRAMS

The Montana Board of Investments needs to increase their flexibility and reduce barriers.

The state should create a clearinghouse of network investors with Montana businesses.

Encourage the legislature to use a portion of the Coal Tax Fund to lend back to Montana businesses, only 4% was used for value-added businesses within our state. Utilize it as a hedge against what banks perceive to be high-risk ventures (provided that venture has a solid business plan).

Increase access to low-interest loans for businesses in start-up phase as well as funds for expansion and diversifying a business.

Increase funding for feasibility studies and business plan development.

Increase awareness of state offered programs by providing one number businesses can call for assistance. Increase inter-agency cooperation.

Banking Industry

PROPOSED SOLUTIONS TO ADDRESSING THE BANKING INDUSTRY

Partner up with a bank and other development corporations to offer medium to long term financing with reasonable interest rates for companies with viable, well-researched business plans.

Make it easy to find and apply for financing.

Develop an innovative structure for the loan. Match uses and sources—structure loans to meet business needs-flexibility.

Reform capital/banking industry attitudes toward investing in Montana value-added businesses. Banks are friendly to businesses that are already successful. We need to market the success stories of businesses that are generating a return on investment. We need to demonstrate the potential of value-added agriculture.

Develop partnerships between the smaller in-state banks that are willing to take the risks, and the out-of-state banks with more capital to lend. This will increase bank lending. To make partnership an attractive option for banks, also include partnerships with other development corporations.

Develop a Montana Board of Investments preferred lender program that lists bank that are willing to lend for agricultural and commercial purposes. Provide incentives to those banks to continue investing in Montana through tax incentives or other means.

Venture Capital

PROPOSED SOLUTIONS TO VENTURE CAPITAL CONSTRAINTS

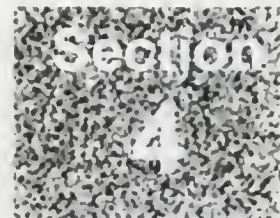
Improve perception of Montana businesses to out-of-state financial sources.

- Identify Montana companies that are success stories and market their story.

Provide incentives to purchase shares of Montana companies

- Market Montana as place to do business, invest in and to buy Montana products.
- Provide tax incentives to banks and capital companies to invest in Montana businesses, plus support HB 49.

Create the perception that Montana is friendly to business and to investment. This needs to be done not only through marketing successful business stories, but also through tax incentives.



Transportation

Accessing Affordable Freight

PROPOSED SOLUTIONS TO ACCESSING AFFORDABLE FREIGHT CONSTRAINTS

Develop a centralized clearinghouse for coordinating shipments in and out of Montana. This center should track purchases of raw materials from out of state, like shipments to warehouses out of state, and in-state shipments.

Once the shipment patterns are established, companies can work together to coordinate efforts and leverage total volume to negotiate better freight rates.

We cannot use the costs of transportation due to location as an excuse. Alberta is similarly located geographically, and yet is known for effective, low-cost transportation. We need to analyze their systems and determine methods of implementing their best practices in Montana.

We cannot change the requirements of grocery stores, but we can begin to consolidate shipments of products that are headed to the grocery store warehouses. This process could be aided by an association.

Warehousing and Logistical Planning

PROPOSED SOLUTIONS TO WAREHOUSING AND LOGISTICAL PLANNING CONSTRAINTS

Utilize the above-mentioned study of shipping patterns and trends to determine where current warehousing is taking place.

Inventory existing warehouse sites and logistical services in the state.

Work with an association to coordinate shipping patterns and logistical planning.

Proposed Action Plan for Addressing Transportation Issues

Through an association or cooperative, research the current transportation systems and shipping patterns.

Network with processors to consolidate shipments in warehouses and then leverage increased volumes to negotiate freight rates.

Provide a logistical coordinator who can assist companies with pooling freight options and getting quick access to freight rates.

Inventory the strengths of companies who currently ship products on a regular basis. Leverage their expertise, assets, and experience to strengthen the whole of Montana processors.

Develop an electronic list serve of transportation activities (who is taking what to where and when).

Examine the option of providing a call center in conjunction with a distribution/warehouse coordinator. Perhaps companies could ship their products to a Montana "hub". All shipments could be coordinated by someone else to save processor time and energy.

Utilize collective energy to pressure legislators to improve Montana roads and to keep fuel costs down.

The goals of the collaborative freight efforts are as follows:

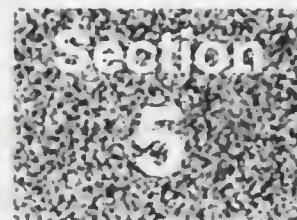
Efficient – coordination between agencies and producers to assist with providing the most efficient and economical distribution of Montana goods in and out of Montana. Consolidation of various transportation options would lower costs.

Affordable – Coordinate efforts/partnerships within industry to cut costs to everyone involved.

Accessible – Since Montana is a vast state, we need to ensure statewide coverage and distribution to available and to ensure information regarding Montana's products and their distribution is provided in a format that is user friendly and easily obtained.

In-state coordination – Need to ensure Montana products and their distribution is coordinated not only in state but also out of state. Need to form an Association/Regional Distribution Centers throughout Montana that can not only warehouse product until its distribution but can also become the dispatcher for all types of haulers (long, short, refrigerated, etc.)

Reliable – Need to ensure a reliable distribution system is in place due to Montana's unpredictable weather conditions and vast highways to the extent of implementing a backup emergency system to ensure distribution throughout Montana.



Infrastructure

Facilities

PROPOSED SOLUTIONS TO FACILITIES CONSTRAINTS

Encourage public and private partnerships to develop and support processing facilities. Utilize the private sector to manage and own the facilities while the public sector works to recruit volume and educate commodity producers.

Develop community-owned facilities and state-owned facilities (examples of state-owned facilities include the Nebraska Food Center and the Alberta Food Processing Centre.) These facilities are publicly-owned, but private ventures pay fees for use.

Provide incentives to businesses that work with community facilities as opposed to businesses that utilize state funds to develop an additional private business without first ramping up through a facility. Provide an incentive for new processors to work in an "incubator", develop a solid business plan, determine a marketing strategy, and then build; versus building and then scrambling to make the business succeed.

Energy

PROPOSED SOLUTIONS TO ENERGY CONSTRAINTS

Develop a major facility ethanol/processing plant in Montana.

Produce energy from by products of value-added processing.

Make certain that Montana has adequate power before power is sold out of state. As a state with enough resources to meet current energy demands and grow our energy surplus, we cannot allow our industries to be without sufficient power.

Promote energy conservation.

Provide a mechanism for Montanans to have a voice on how rates are structured and set in-state. The out-of-state demand is high enough that once capped in-state needs are met, market values can determine the price for exported energy.

Provide an incentive for companies that supplement their energy needs with alternative sources – solar, wind, gravity fed water systems on farms, generators in refineries, etc.

Utilize federal grants and other programs to develop several smaller plants as opposed to a mega-provider that could develop a power monopoly.

Develop a program for educating people that Montanans are good stewards of the land and that hydro-power and other energy generation plants can be developed in a responsible manner.

Why isn't coal on the list of energy alternatives? We can now process coal in a clean manner. It is a great asset to the state and we should advocate it as an alternative to hydro-power.

Develop three plans for energy – alternatives and contingency plans.

Short-term plan – present to June 2002

Intermediate term plan – 5 years

Long-term plan – beyond 5 years

Industry needs to take the initiative to educate communities, suppliers, and customers as to the value that their business brings to the state and then to drive home in importance of affordable energy in maintaining that business.

Technology

PROPOSED SOLUTIONS TO TECHNOLOGY CONSTRAINTS

Once a wireless I/T system is developed, bring state and local government into the structure to increase the volume on the system and lower per unit costs.

Increase availability of systems such as Met Net.

Develop industry partnerships for developing and acquiring technology to reduce costs.

Unless we are internet capable by 2005, Montana will be unable to compete in the world market. The state needs to set a time as to when the state will be "high speed" and then take a proactive approach to making it happen.

Montana needs to provide incentives to private tech businesses to get systems in the state. Currently, technology is being implemented all around us.

We need more education from the industry as to what systems are available to us.

Montana needs to encourage wireless connections.



Workforce Investment

Proposed Solutions to Workforce Investment

Share resources or find expertise as a group instead of individually. Also, find a way to tap downstream expertise. There are many experts in Montana, but their skills and experience are not leveraged.

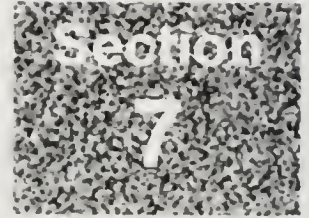
Through a value-added manufacturers association:

- Establish a clearinghouse for workforce training and development.
- Work with industry to articulate training needs. Then partner with vo-techs and universities to offer training to potential and existing employees.
- Partner manufactures for safety training courses required for worker's compensation to lower costs for the group members.

Simplify the worker certification process at the state level.

Improve the information exchange and process for labor needs from producers. Again, this could be accomplished through an association. Currently, depending on the specific business, worker's need to be certified in HACCP, proper food handling, etc. Can county sanitarians, or the association, be a clearinghouse so processors can easily train their workers?

Utilize the association as a clearinghouse to improve access to information on employment rules and regulation, training requirements, and what a company needs to do to meet the needs.



Research and Development

General Comments

PROPOSED SOLUTIONS FOR GENERAL RESEARCH & DEVELOPMENT CONCERNS

The Department of Agriculture and the Department of Commerce should form a focus group charged with the responsibility of determining a common interest and vision in developing products for Montana. Focus group should include the Department of Agriculture, producers, consumers, various other state agencies – including the university system, and non-profit organization and association representatives.

The focus group should also address areas for collaboration and cooperation in the public & private sectors.

Focus group should examine opportunities for partnerships from field to plate that relate to the common vision. Research efforts can then be coordinated to enhance the economy through specific product development efforts.

When projects are identified and researched, avenues for producer investment can be explored (LLC, cooperative, etc.).

Food Science & Product Development

PROPOSED SOLUTIONS FOR FOOD SCIENCE & PRODUCT DEVELOPMENT

Support the development of an institute or research center for value-added processing

Institute development should be lead by Montana State University in conjunction with other universities and state agencies. However, the development of this center must be industry-driven. Producers and processors must be involved to generate buy-in and support.

Financial support for the facility should be state funded with industry match.

Provide industry the opportunity to take an equity position in the facility. This forces industry to take an active role in determining the objectives of the center.

Capture the profits of the center for reinvestment in industry research and development.

Biotechnology

PROPOSED INITIATIVES FOR DEVELOPING BIOTECHNOLOGY

Biotechnology provides Montana an opportunity to develop innovative products that provide a competitive advantage. This advantage could be utilized to revitalize agriculture in Montana.

Include a biotechnology component of the proposed research facility, which can address adding value to agriculture through new technologies.

In conjunction with developing biotechnology, we need to initiate an education of the public about biotechnology products. This education should aim to provide information on the consumer benefits of biotech products, the benefits to agricultural producers, and the results of research. Education addresses consumer fears/concerns about biotechnology. It should not try to "sell" the products, but should try to provide the facts about the potential for economic development in conjunction with safe products.

Identity Preservation & Quality Assurance

PROPOSED SOLUTIONS TO IDENTITY PRESERVATION AND QUALITY ASSURANCE

Focus group will work to visualize success in terms of identity preserved products developed under strict quality assurance standards and define what is needed to achieve that success.

Generate an industry-driven set of product quality standards, which create demand for Montana products to the extent that it encourages construction of processing facilities within the state.

Develop a feedback structure to evaluate the raw materials of viable products and then tracks the product to monitor the financial impact of producing products that the consumer demands.

Determine standards for quality production and leverage the food center to create more consistent products.

Economic Analysis

PROPOSED SOLUTIONS TO ECONOMIC ANALYSIS

The focus group appointed to make recommendations on food science should help to develop a conduit for industry to indicate the types of research needed to develop value-added processing.

Once needs have been assessed, the food research/biotechnology center needs to track the economic strength maintained or gained due to the profitable commercialization of agricultural products.

The food research/biotechnology center needs to track the "spin off" economic effects of successful products (impact on communities where products are grown and processed as well as impact on the state.)

The food research/biotechnology center needs to develop a collection of data structures that collectively combine data to make it more viable for economic analysis.

We also need to continue to track the economic benefits to the US market in the global economy due to increase yields, better food quality, etc., that result from research and new product development.

Market Research

PROPOSED SOLUTIONS TO MARKET RESEARCH

Create a new paradigm of processing products to meet consumer needs.

The food processing/biotechnology center needs to conduct research on the consumer demand and market trends. Within that context, analysis needs to be conducted on the demand for branded products with identity preservation and specific quality standards. Are consumers willing to pay a premium for identity preserved and quality certification?

Based on quality market research and research generated from economic analysis, the state can establish or encourage facilities that require raw materials from Montana and meet an identified demand in the market.

Overall Summary

At the heart of generating research and development efforts described above is dedicating university resources to value-added processing of agricultural products. The steps to not only dedicating resources, but also to developing appropriate research and development work are as follows:

1. Create a focus group as described in the Food Science and Product Development section. The focus group should make recommendations concerning research and development for food and bio-based products. This focus group should be led by agriculture in conjunction with the university system, federal and other state agencies, non-profit organizations, consumers, and industry leaders. Group size should be kept small for maximum effectiveness.

2. Develop a food/biotechnology center out of partnerships between the university system, industry leaders, non-profit organizations, and federal agencies. This center will not only assist companies with specific product research and development, but will also conduct the research described above.
3. Develop a separate center that is funded by private industry dollars which focuses on identity preserved products, private labeling, and other for-profit product development functions.
4. Incorporate standard for reporting results and proving information to the industry as a function of business start-up.



Marketing

Marketing Assistance

PROPOSED SOLUTIONS TO MARKET ASSISTANCE CONSTRAINTS

Form a Montana Food Processor's Association as a forum for sharing different marketing options. Possibly contract a Food Processing Association broker to help sell Montana products.

Increase the availability of affordable marketing assistance for producers.

Provide a state-funded resource at MSU that does research on getting particular products to market and then be available to assist companies in learning how to get the product to market.

Increase the number of available funds for market research and implementation of marketing plans.

Promote and share with the public the success (failure) stories of companies that have received funding from grants/loans through state agencies. Create a clearinghouse of proposed marketing plans for companies to review what has been tried, what worked, what didn't work, and why.

Create an international marketing agency that researches where to position Montana products in global markets.

Establish a taskforce to create a Montana Food Marketing Association. The taskforce should examine funding for start-up, where it is housed (public vs. private sector), the by-laws, recruiting the board of directors, objectives, and continued support for the association.

Incorporate a marketing and training component to the government resources and the association to help processors access information. Further, make seminars a forum to assist businesses with the development of marketing plans.

Marketing the Montana Image

PROPOSED SOLUTIONS TO MARKETING THE MONTANA IMAGE CONSTRAINTS

Position the Image of Montana – hire a marketing firm to define and then develop a marketing campaign that sells the Montana image.

Utilize the best practices of other states to develop a marketing effort. Vermont was cited as a strong example of a quality program.

Develop a Montana Image Advisory Council or association, which coordinates a comprehensive strategy and marketing plan to market the image of the state. The image developed should include the following components:

- Montana pride in quality is stated clearly to purchasers.
- Cooperative advertising efforts.
- Links to the research and marketing efforts of Travel Montana.
- Strict standards for participation.
- Enforcement of program criteria – give the program teeth.
- Montana Mall on the web that promotes products.
- Looks like a company, market like a company, generate sales like a company.
- Common logo or design that creates a unified look for Montana products.

The Marketing Montana program should work in conjunction with an association of food processors to ensure links to appropriate connections, education of consumers and producers, a continuation of a “common” vision, and for additional leverage of the label.

Market Demand

PROPOSED SOLUTIONS TO MARKET DEMAND CONSTRAINTS

Utilize the association to do cooperative market research.

Develop a clearinghouse of trade leads. Utilize the Internet to relay information about demand for products.

Train producers to find and research their target markets.

Once a target market has been identified for a given product, develop state and private resources to assist with accessing the market.

Producer Marketing Problems

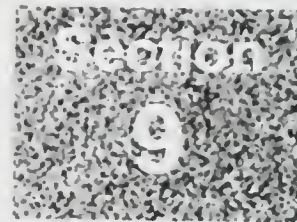
PROPOSED SOLUTIONS TO MARKETING PROBLEM CONSTRAINTS

Develop an association that will provide a forum for cooperative marketing efforts between processors.

Ask the association to examine the costs and benefits of establishing a "Montana" brand and having companies provide goods under a "private label" relationship.

Ask the association to fund seminars from Nebraska, Iowa, and other states that have effective programs in place. These seminars will help to educate processors on available options and on issues such as lean production models, price structure, etc.

Work collectively to participate in trade shows. Ask the association to identify appropriate shows, and then have the state work to recruit buyers to attend the shows.



Implementation Plan

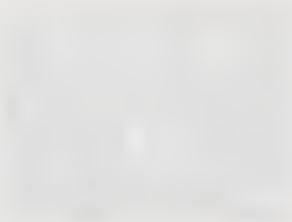
Ralph Peck, the Director of the Montana Department of Agriculture, and Governor Judy Martz reviewed the constraints and solutions provided by participants of the Governor's Conference on Value-Added Food Processing. As a result, they determined that the following course of action could best provide timely response to the identified issues.

Montana Food Processing and Value-Added Agriculture Advisory Council

Governor Martz has asked Director of Agriculture, Ralph Peck, to appoint and assist a Montana Food Processing and Value-Added Advisory Council. The overall objective is to enable involvement and direction from you as businesses and agricultural representatives in Montana. The Advisory Council is charged with the following:

1. Develop a collaborative strategy on the part of Montana food processing and value-added companies, which may take the form of a cooperative or an association. The strategy will address formation issues, purpose of the association, and duties of the proposed entity. This will help Montana companies to leverage their collective strengths.
2. Make recommendations for the development of a collective vision for marketing the Montana image. This will help Montana companies to portray a consistent and meaningful image, making the most of the positive aspects of Montana's "mystique."
3. Explore what it means, from a food processing and value-added perspective, for Montana's infrastructure to be "business-friendly." This includes gaining insight on current and proposed administration changes, facilitating an educated effort regarding those changes, and looking for additional business development needs.

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